

TeleMessage Plug-In Installation Guide for Lotus Notes R6.X

The TeleMessage template is a standard Notes Mail template and can be treated in the same way as any other Notes template.

Using the TeleMessage Template for Notes you can replace an existing database design, create a new database.

We strongly recommend that you let your Lotus Domino Administrator read this guide and install the TeleMessage plug-in for you. If it is not possible follow the steps described below. Consult your administrator when required.

The following guide will instruct you how to install the TeleMessage Mail Plug-in for Lotus Notes on a single mail database.

Important: before you take any action, read this document thoroughly.

Minimum Requirements and security issues:

1. You should download and run PrerequisitesTM.exe on the machine that runs your Domino server and on the machines of all Notes client users who will use the Plug-in.
The file can be found here: <http://download.telemessage.com/notes.html>
2. You should have Lotus Notes Release 5.0.5 or later installed on your computer.
3. Your mail database should reside on Domino server Release 5.0.11 or later.
4. Your default browser should be Microsoft Internet Explorer version 5.0 or later.
5. Access to the internet is required from both client side & Domino server side (if security issues prevent you from granting such access, please contact us support@telemessage.com).
6. None of the standard Lotus mail design elements (such as the Inbox folder or the ACLManagement script library) in your mail database should have the "Prohibit design refresh or replace to modify" option enabled in the design document properties. If you have done changes to some of the standard design elements in your mail database and you would like to keep those changes, please contact us support@telemessage.com.
7. The user ID file you use when installing the plug-in should have Designer access to your mail database in the ACL with all the possible "Allow:" permissions checked (so that you can replace the design).
8. If the TeleMessage template will reside on the server, the user ID you use when installing the plug-in should have at least Reader access to the TeleMessage template.
9. The signer of the mail database with TeleMessage plug-in, must have permission to "Run unrestricted methods and operations", on the server where the mail database resides.
10. The signer of the mail database with the TeleMessage plug-in, must have Designer access to the mail database with permissions to:
 - "Delete documents",
 - "Create LotusScript/Java agents"
 - "Replicate or copy documents"

11. The signer of the mail database must be granted at least the following ECL permissions on the workstation:
 - "Access to file system"
 - "Access to current database"
 - "Access to environment variables"
 - "Access to external programs"
 - "Ability to send mail"
 - "Ability to export data"
 - "Ability to modify other databases"
 - "Access to Network".
12. The user of the database must have at least Editor access to his mail database in the database ACL

Please see **Annex A – Security configuration for TeleMessage Plug-in** for detailed instructions on how to ensure requirements 6 – 11 are met.

Making a backup copy of your database. IMPORTANT!

Before installing the TeleMessage template, backup you mail database and verify the backup copy according to the usual backup process in your organization. If you don't sure how to do that, consult your Domino administrator.

If you don't sure how to backup your database, your administrator is not available and you still wish to install TeleMessage Plug-in, make a copy of your mail database according to the following steps:

- a. Open your mail database and choose:
File → Database → New Copy (see figure below).

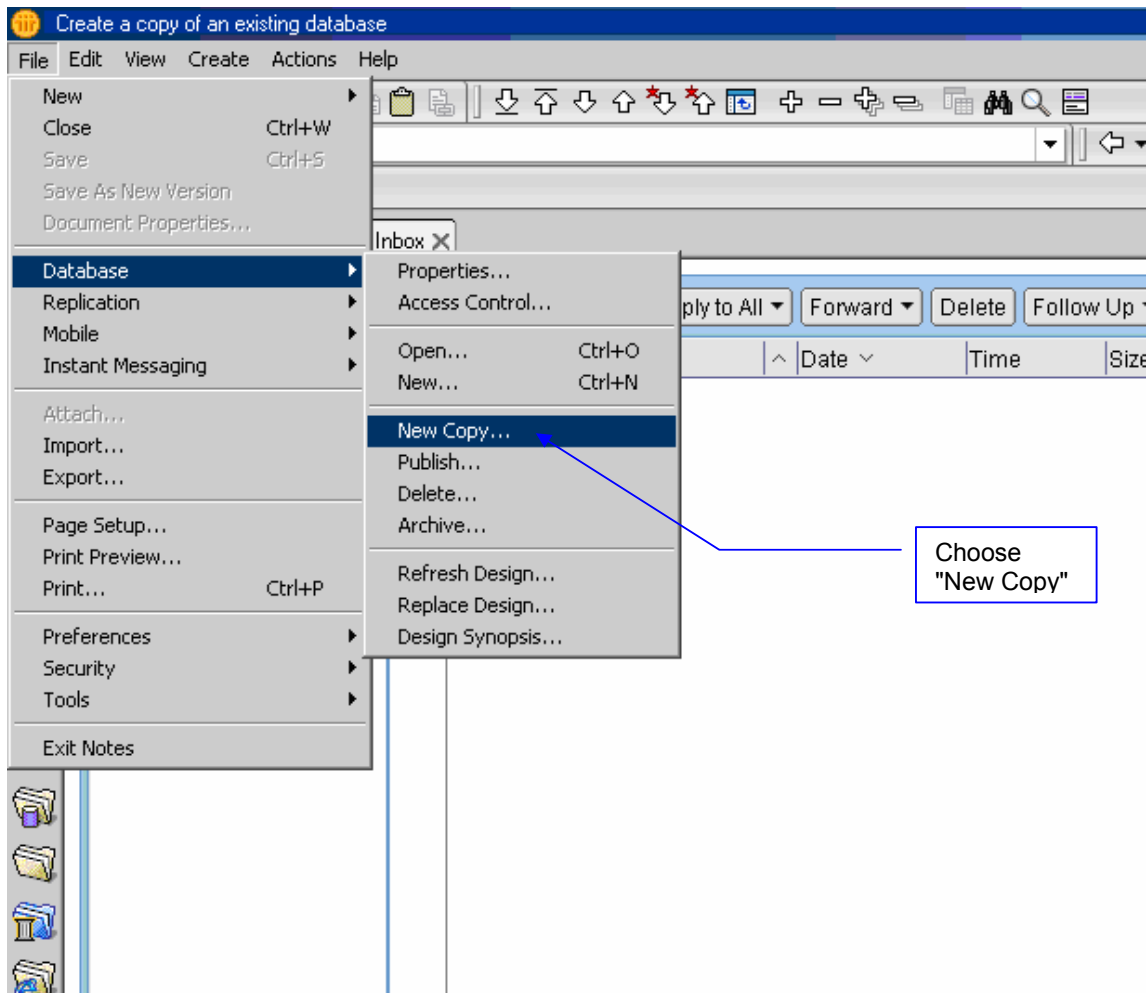


Figure 1 – Choosing a new Database Copy

- b. In the “Copy database” dialog do the following (according to the figure below)

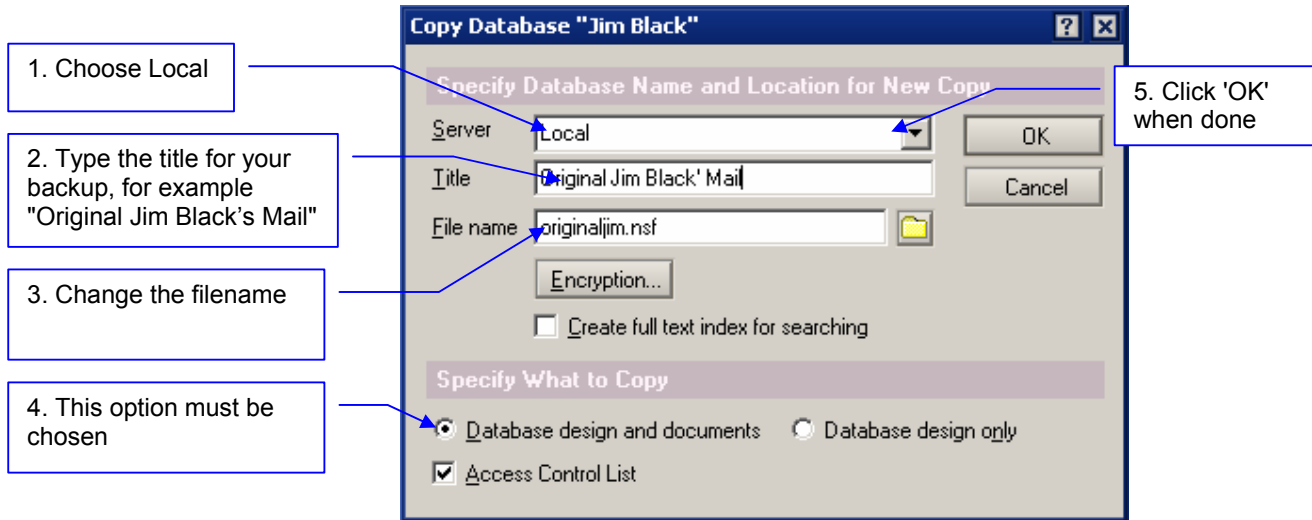


Figure 2 – Saving a copy of the Original Design

- i. In the “Server” field, select “Local”.
- ii. Enter a title for the backup (e.g. "Original Jim Black's mail")
- iii. Change the file name (i.e. add a prefix “original” to it)
- iv. Ensure the “Database design and documents” option is chosen
- v. Click “Ok”
- vi. If a dialog asking “Replace existing <path>.ntf file ?” appears (see figure below for example), click “No” and go back to step iii.

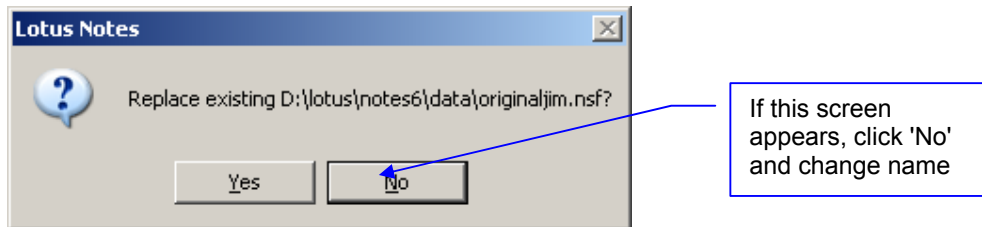


Figure 3 – preventing from overriding existing files.

After clicking “Ok” in step iv. , the copying process will start and a progression bar will appear in the bottom of the Notes window as in the figure below.

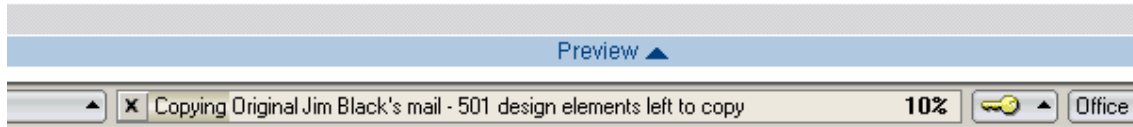


Figure 4 – Database copying progression bar.

Wait several minutes until the copying process is completed. At the end of the process, “Database Copy Completed” will appear in the bottom of the Notes window on the left. (see figure below)

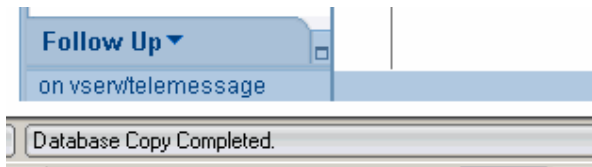


Figure 5 – Database copy completed message.

Preparations:

1. **Important:** If you have added custom agents, folders or other design elements to your mail database or template, you must ensure you have checked the option to “Prohibit design refresh or replace to modify” in the design documents of those elements. Otherwise these elements will be lost.
2. If you have downloaded the zipped file, extract the Mail(R5-6)TM.ntf file from it.
3. Using the Domino Admin client sign the TeleMessage template (the filename of the template is “Mail(R5-6)TM.ntf”) with user ID which has all the required security permissions as specified in “Minimum Requirement and security issues”.
4. Place the signed template into the data directory of your Domino server, OR, for a single install, the Notes\Data directory on your computer (a usual path of the directory is “C:\Program Files\Lotus\Notes\Data”).
5. Using the Domino Admin client prepare a user ID file which you will use for replacing the design of the mail database. Please see “Minimum Requirement and security issues” in order to ensure the user ID you prepare has sufficient security permissions.
6. If you have not installed PrerequisitesTM.exe yet, please install it now on the machine that runs your Domino server and on the machines of all Notes client users who will use the Plug-in.
The file can be found here: <http://download.telemessage.com/notes.html>

Notice: If you had had no proper user IDs and security permission till now and you had to make changes to your sever document ACL, ECL or to create new user(s), those changes may not take effect immediately. Consult your Domino administrator to make sure that the changes had taken effect before you continue.

If administrator is not available before you continue, please allow sufficient duration for Domino server to process and apply the changes. We recommend that you wait about two hours to be sure the changes took effect.

For more detailed instructions on performing steps 2 and 3 please see Annex A – “Security configuration for TeleMessage Plug-in”

Installation instructions:

1. Launch the Notes Client, make sure you are using a user ID which has all the required security permissions that are specified in “Minimum requirements and security issues” section above.
2. Open your mail database.
3. Replace the design of your mail database with TeleMessage template:
 - a. Choose File, Database, Replace Design... (see figure below)

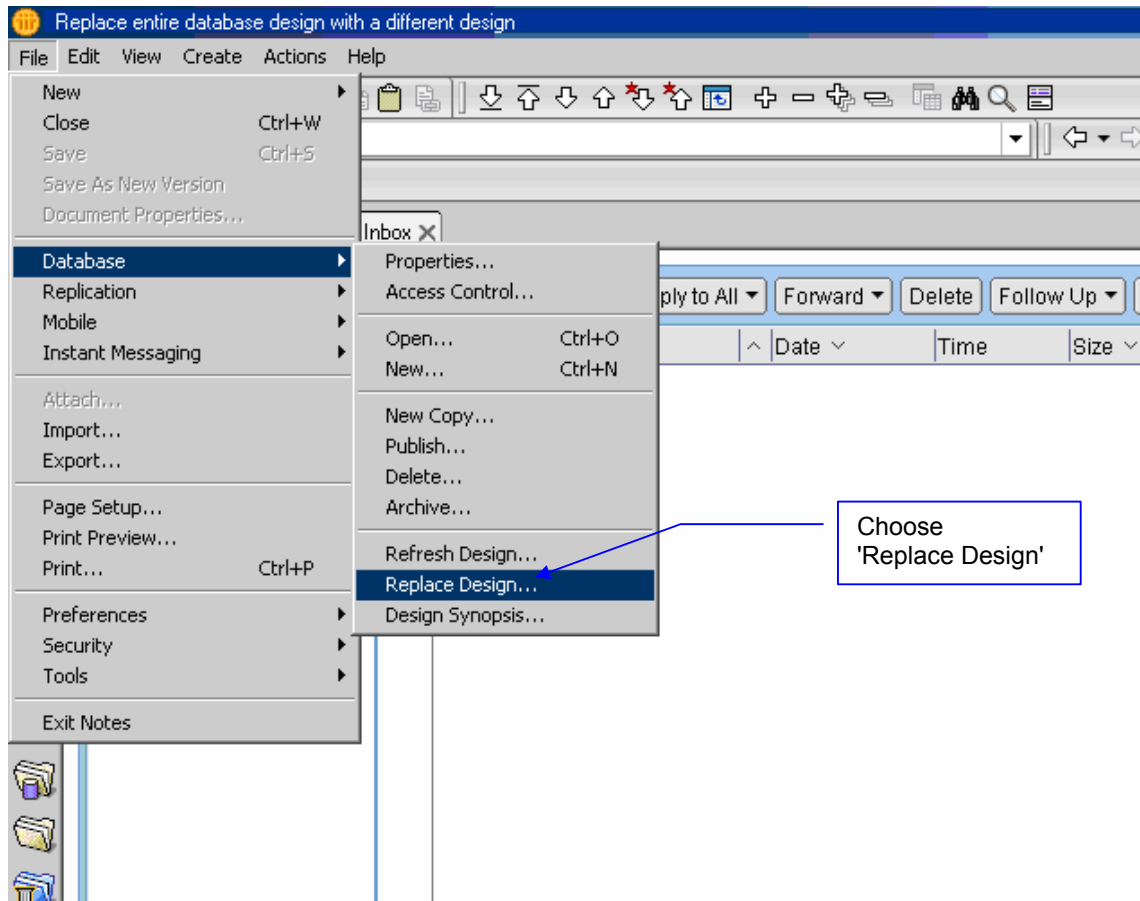


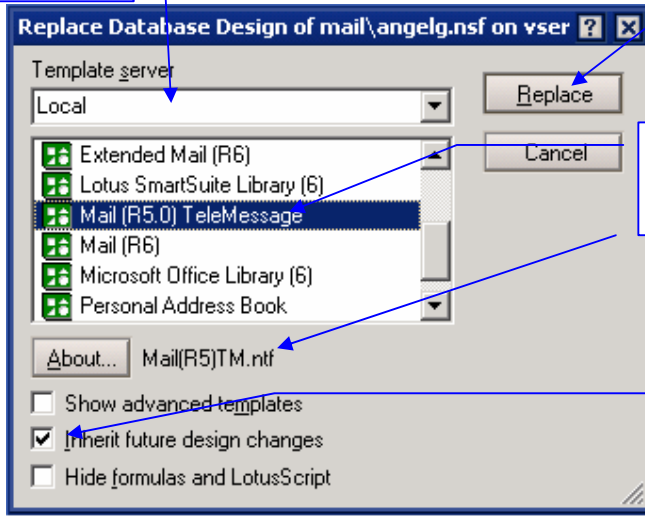
Figure 6 – Replace Design of Database

b. In the “Replace Database Design” dialog, do the following (as explained in the figure below):

- i. In the “Template server” field choose the name or the server where TeleMessage mail template resides or “Local” if it resides in a local directory.
- ii. Choose “Mail (R5.0) TeleMessage”
- iii. Check “Inherit future design changes”
- iv. Click “Replace”

1. Choose the location of the TeleMessage template

4. When you are done, Click 'Replace'

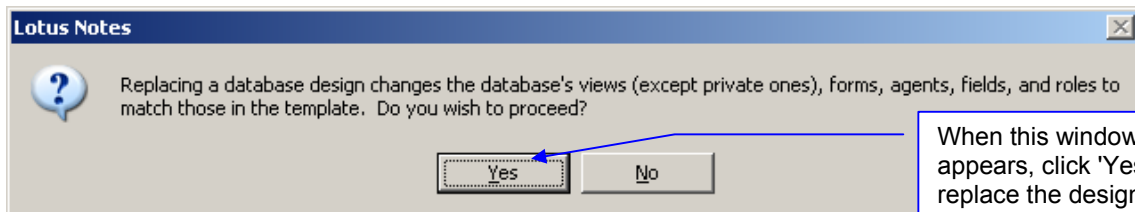


2. Choose 'Mail (R5.0) TeleMessage' Template. The file name that will appear next to the “About” button, should be Mail(R5-6)TM.ntf

3. Check “Inherit future design changes”

Figure 7 – Choose the TeleMessage Design and Replace

v. A dialog as on the next figure will appear. Click “Yes”.



When this window appears, click 'Yes' to replace the design

Figure 8 – Confirm Replacement of the Design

- vi. The replacing process will begin and will take a while. Progression bar as in the figure below will in the bottom of Notes window.

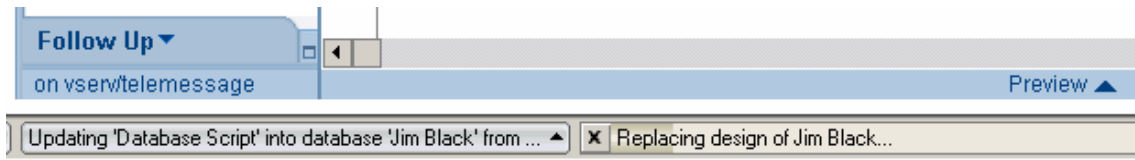


Figure 9 – Replacing design progression bar.

- vii. When the replacing process ends, (a message like in the figure below in the bottom of Notes window will appear) close your mail database and reopen it.

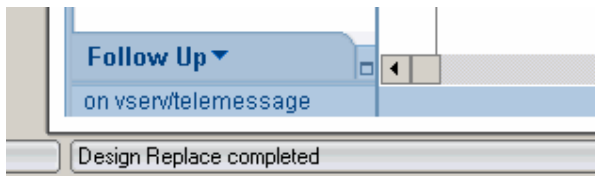


Figure 10 – Database copy completed message.

4. Trusting the TeleMessage design

In case the TeleMessage template is signed by user ID which has no sufficient permissions in the ECL on the workstation you will have to manually approve the TeleMessage Application. You will be asked to do so, on the first usage of some of the regular mail and TeleMessage functions. In such case, when you will use some of your Mail/TeleMessage options for the first time after installing the TeleMessage template, you may receive a security alert (see example in figure below).

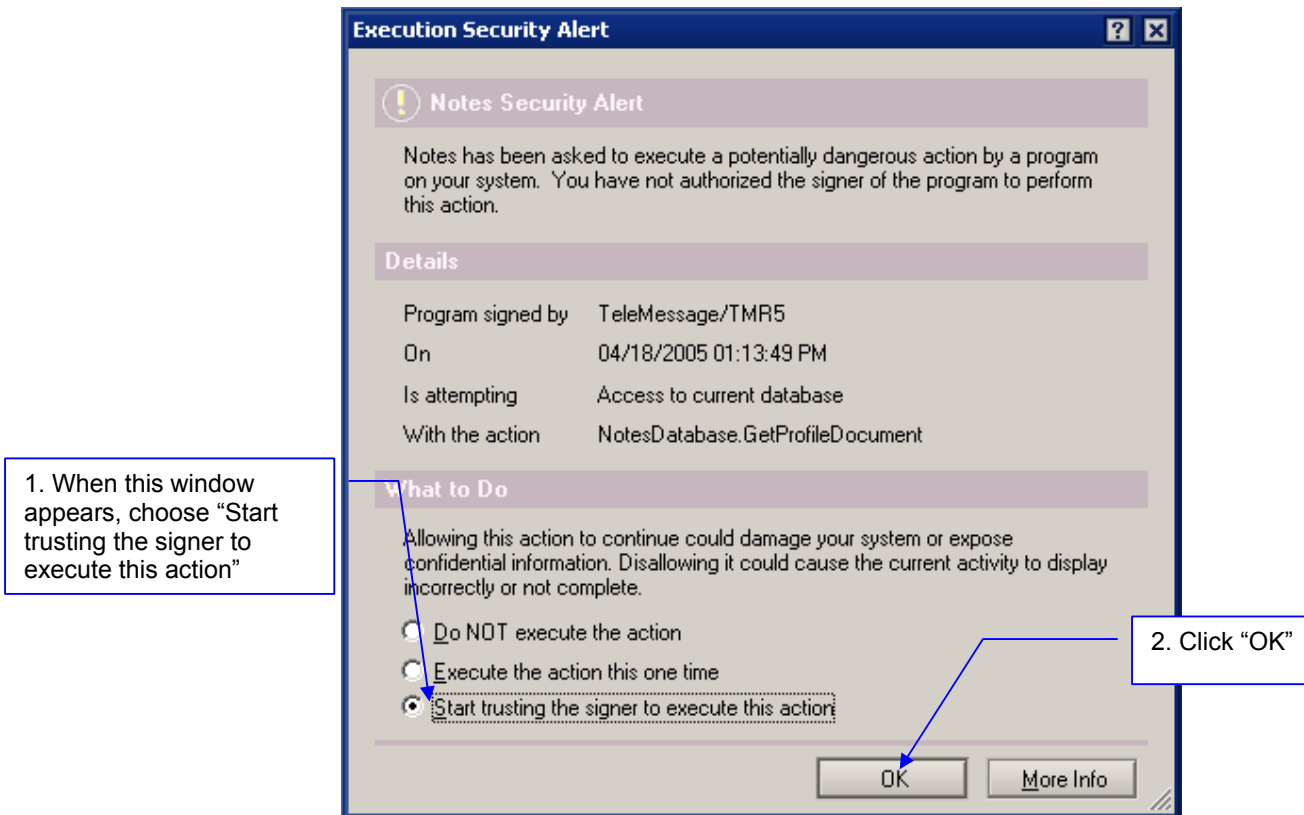


Figure 11 – A sample of a Security Alert where you will have to "Trust Signer"

This message will re-appear each time you use some of the features for the first time. So you will have to repeatedly choose "Start trusting signer to execute this action" and then click "Ok" a few times.

If the option of "Start trusting signer to execute this action" is disabled for you, choose "Execute the action this time". Doing that all the time is extremely inconvenient. We strongly recommend your Domino administrator to assist you granting the signer of your database with proper permissions in the ECL on your workstation.

5. Product Activation:

Click the “New TeleMessage” button which now can be found in your Inbox in the action bar next to the “New Memo” button (see the next figure below).

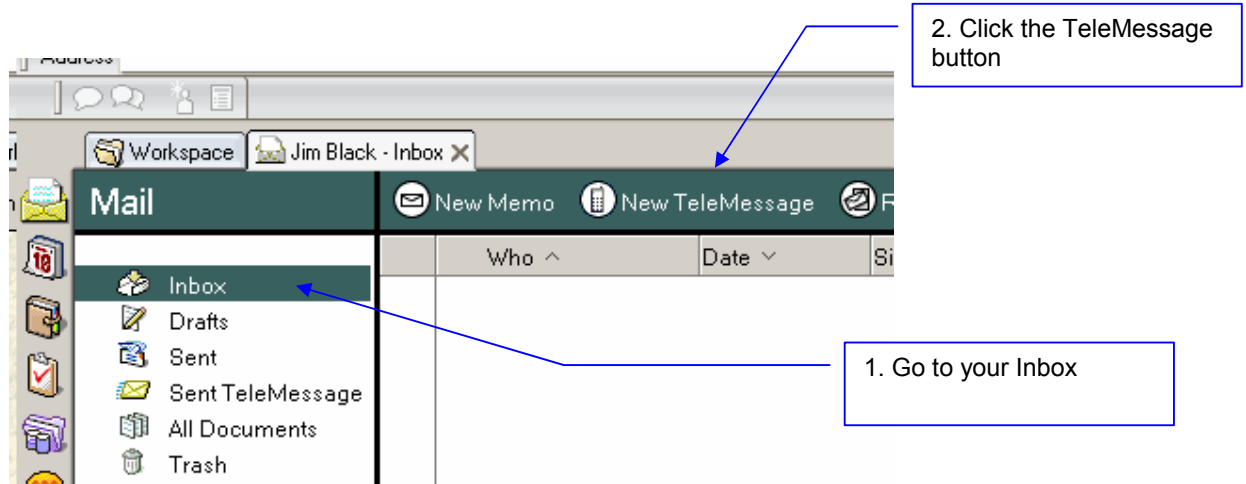


Figure 12 – TeleMessage warning window in case product is Not Activated

On the first time you do that, you will receive the following warning:

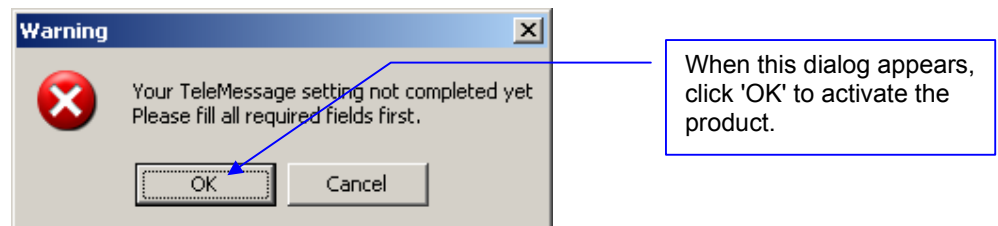
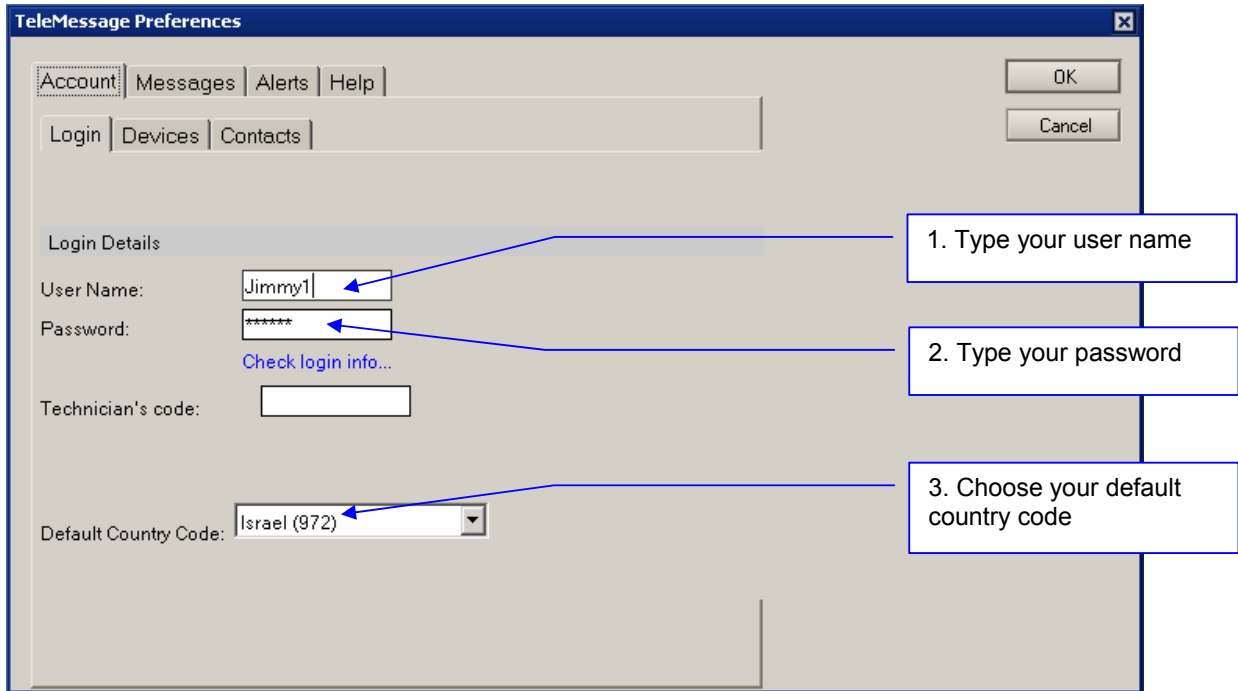


Figure 13 – TeleMessage warning window in case product is Not Activated

After clicking “Ok” the TeleMessage Preferences form will appear (figure the following figure).



TeleMessage Preferences

Account | Messages | Alerts | Help

Login | Devices | Contacts

OK

Cancel

Login Details

User Name: Jimmy1

Password: *****

Check login info...

Technician's code:

Default Country Code: Israel (972)

1. Type your user name
2. Type your password
3. Choose your default country code

Figure 14 – TeleMessage Preferences and Activation Window

Please fill you User name and Password. (the ones you received in the registration process in: <http://download.telemessage.com/download/signUpForm.jsp>)
Then fill your Default country code and Click “Ok”

Un-installation:

In case you would like to remove the TeleMessage application, you will have to restore your original mail database design.

Important:

Before you restore your original mail database design, backup you mail database according to the instructions in “Making a backup copy of your database” chapter.

If after you have installed TeleMessage plug-in you have added custom agents, folders or other design elements to your mail database or template, you must ensure you have checked the option to “Prohibit design refresh or replace to modify” in the design documents of those elements. Otherwise these elements will be lost.

To restore your original design follow these steps:

- a. Choose File, Database, Replace Design... (see figure below)

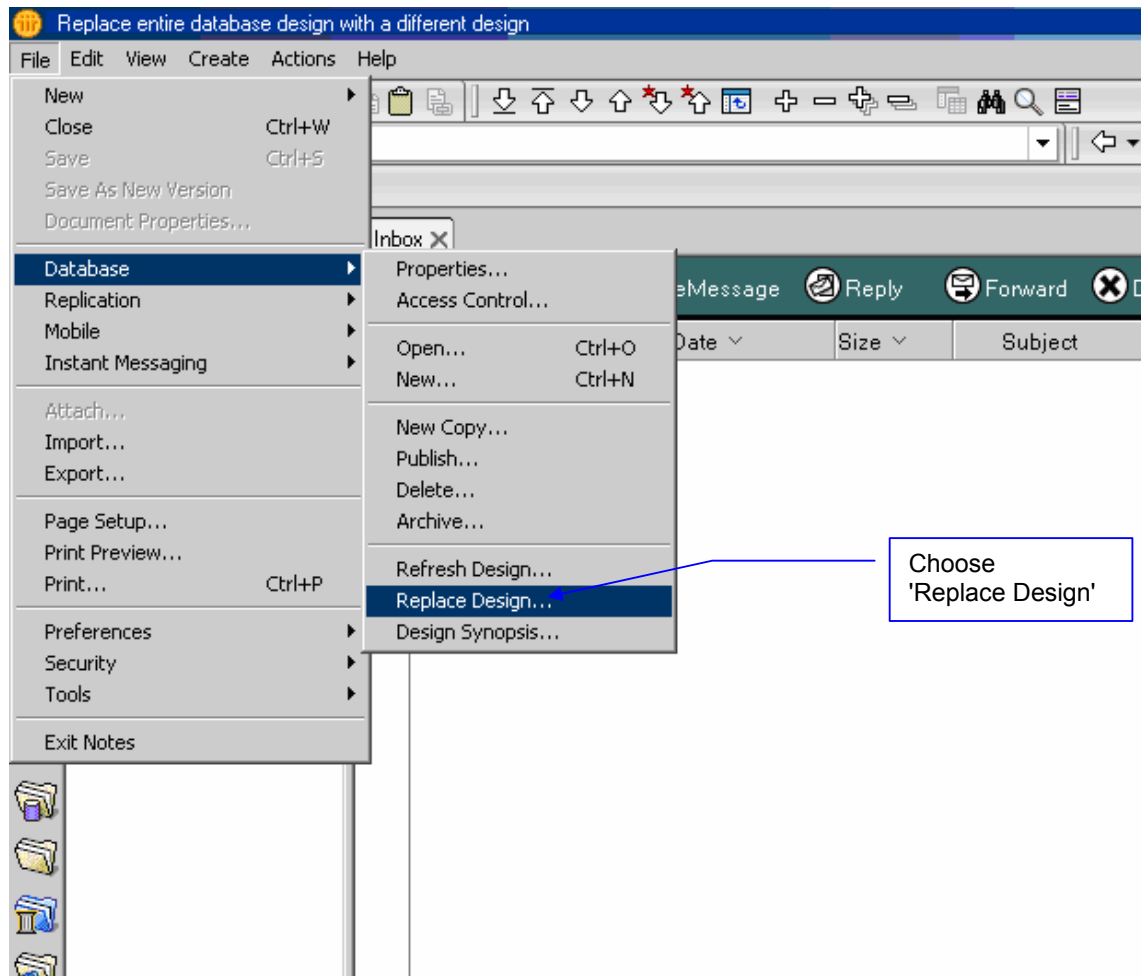


Figure 15 – Choosing to Replace the Design (back to original)

- b. If your mail database was not inheriting its design from a template, ask your administrator to make a template from the copy of your database that you have created earlier (see “Making a backup of your database”)
- c. In the “Replace Database Design” dialog, do the following (see example on the figure below):
 - i. In the Template server field choose the name or the server where TeleMessage mail template resides or “Local” if it resides in a local directory.
 - ii. Choose the original design you had (consult your Domino Administrator)
 - iii. Check “Inherit future design changes” if required (consult your administrator)
 - iv. Click “Replace”

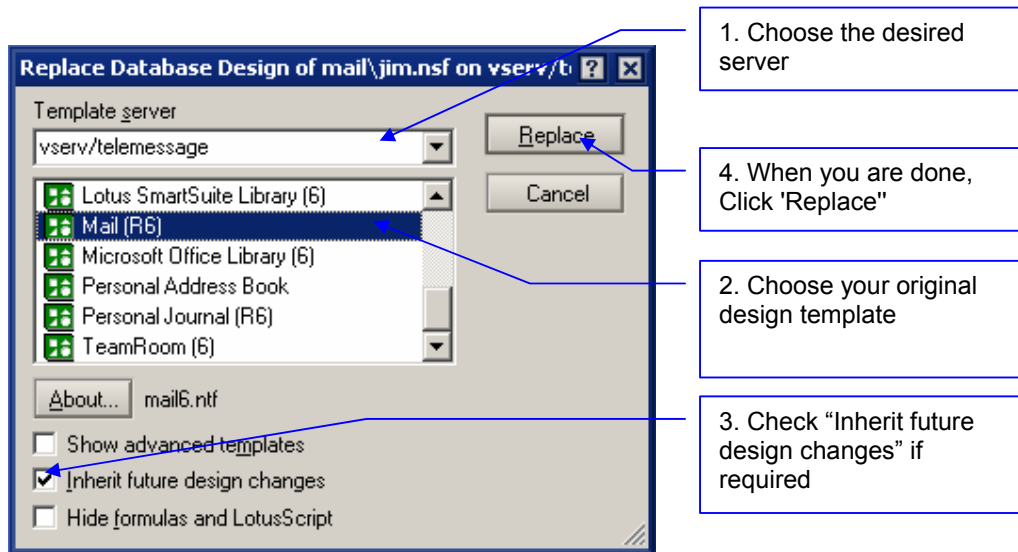


Figure 16 – Choosing the Original Design to Replace

- v. A dialog as on the next figure will appear. Click “Yes”.

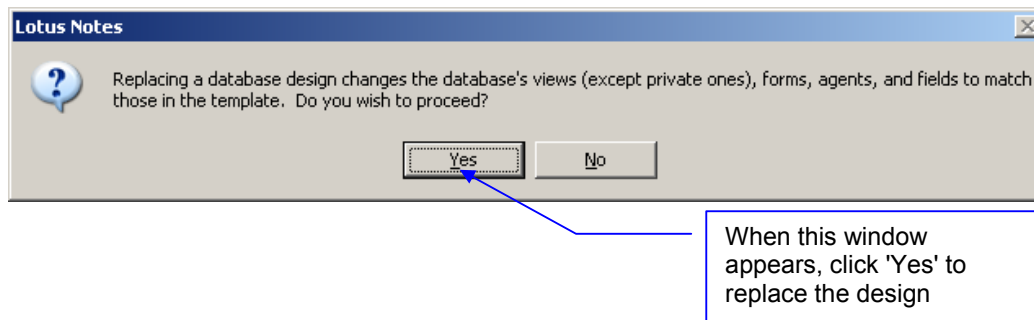


Figure 17 – Confirm the Replace of the Design

- viii. The replacing process will begin and will take a while.
- ix. When the replacing process ends, close your mail database and reopen it.
- vi. Your original design, without the TeleMessage functionality, will appear again.

Enjoy the TeleMessage Plug-In for Lotus Notes!

For additional help, please contact: support@telemessage.com

Annex A - Security configuration for TeleMessage Plug-in

This annex includes instructions for configuring the security setting required for using the full functionality of TeleMessage Plug-in to work. To carry out the actions described here you should use Lotus Domino Admin client Release 6.5.1 or later R6.X version.

1. Switching user ID

If the user ID file you use does not have sufficient permissions to perform some of the operations described in this annex, you will need to switch the user ID to an ID with the highest security permissions possible. For determining the right ID file, consult your Domino administrator.

To switch the ID:

- a. File → Security → Switch ID... (see figure below)

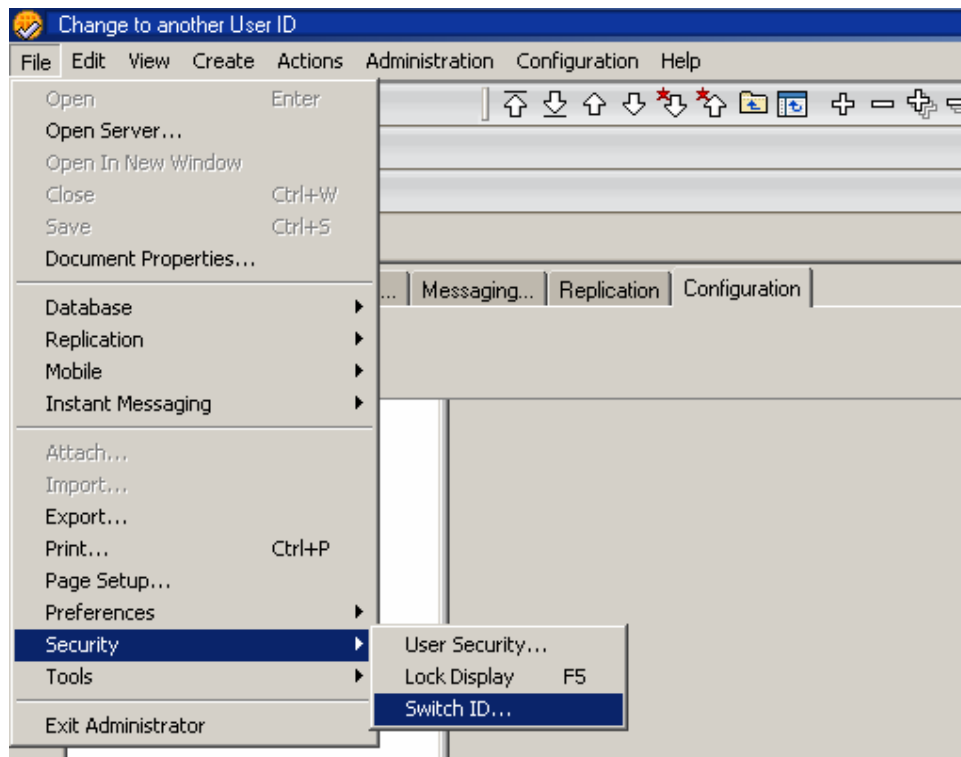


Figure 18 – Switch ID... menu option

- b. In the “Choose User ID to Switch To” dialog (see example in figure below) choose the appropriate ID file and click “Open”

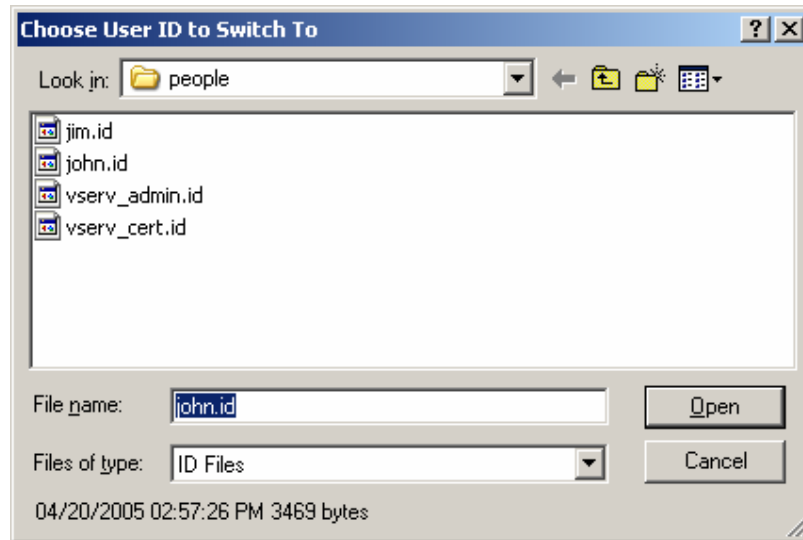


Figure 19 – “Choose User ID to Switch To” dialog

- c. Type the password of the ID you have chosen in the dialog that will appear (see example in the figure below) and click “OK”.

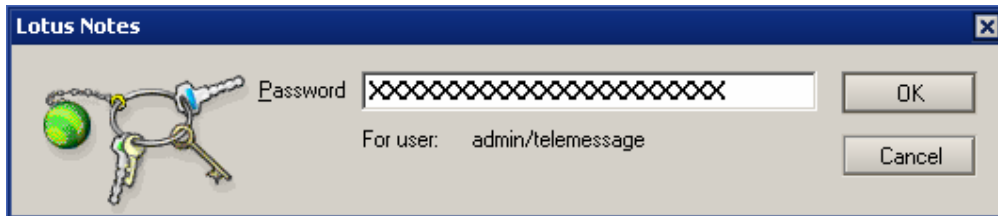


Figure 20 – typing the password for user ID

2. Allowing the Domino server applying security settings changes

If you had had no proper user IDs and security permission till now and you had to make changes to your sever document ACL, ECL or to create new user(s), those changes may not take effect immediatly. Consult your Domino administrator to make sure that the changes had taken effect before you continue. If administrator is not available before you continue, please allow sufficient duration for Domino server to process and apply the changes. We recommend that you wait about two hours to be sure the changes took effect.

3. Security configuration in the Server Document

TeleMessage Plug-in requires a signature of a user that is listed in the "Run unrestricted methods and operations" field in the security tab in the server document.

To add the user to the field, follow the steps described on the two figures below (the names of the entities on the figure are just examples):

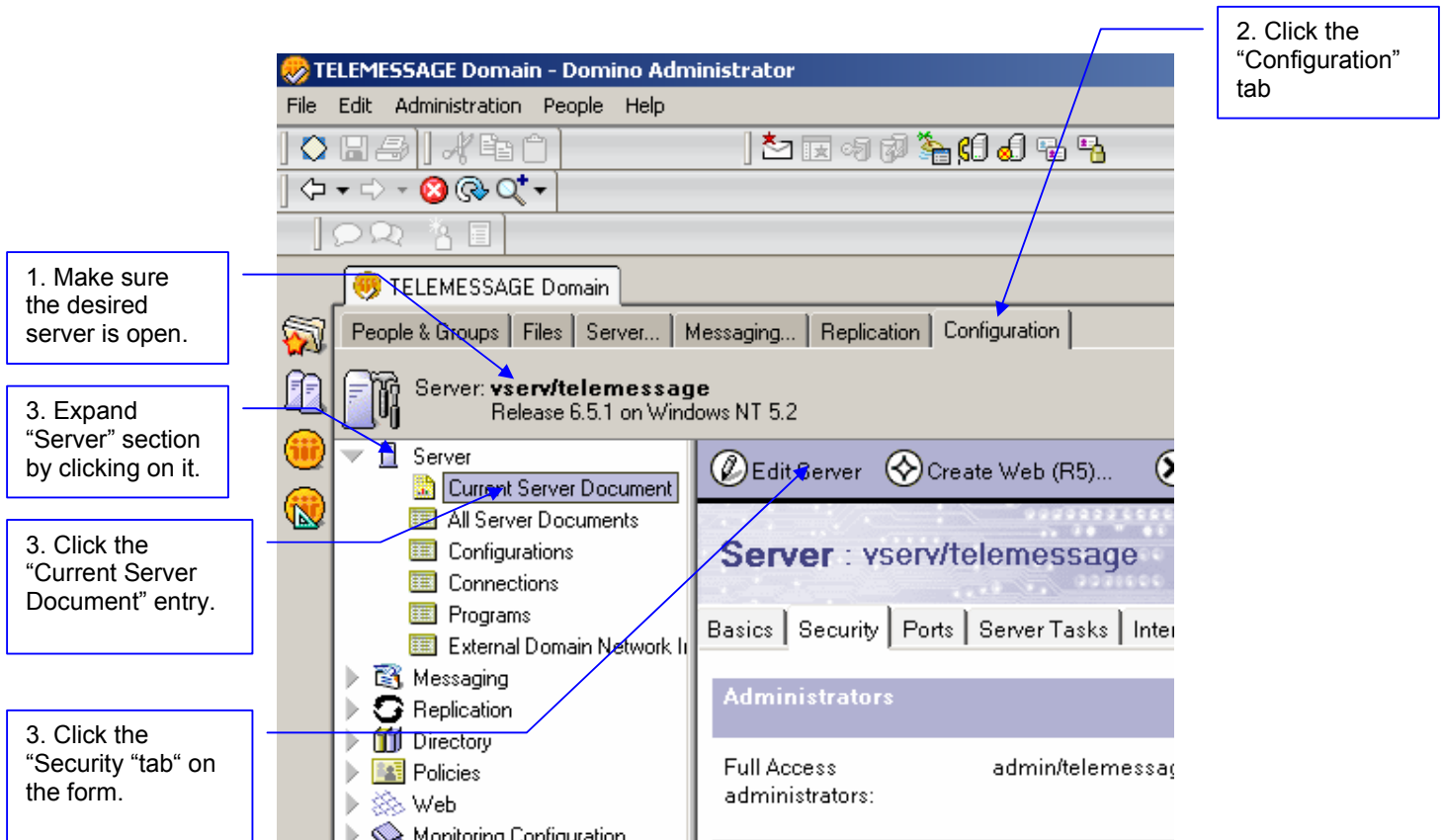
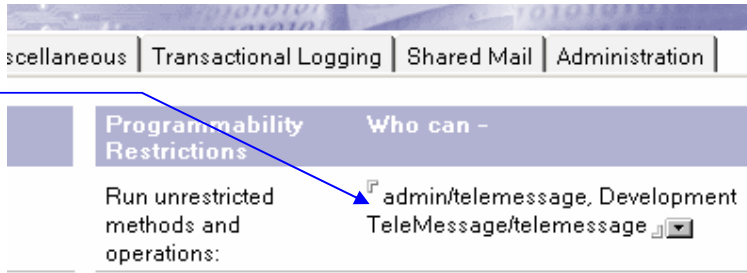


Figure 21 – Editing the security tab of the server document

Enter the user here.



miscellaneous | Transactional Logging | Shared Mail | Administration |

Programmability Restrictions Who can -

Run unrestricted methods and operations: admin/telemesssage, Development TeleMessage/telemesssage ▾

Figure 22 – "Run unrestricted methods and operations" field

4. Managing database ACL (Access control list)

TeleMessage Plug-in requires that the signer of the mail database with TeleMessage Plug-in will have at least a particular access level to the database specified in the database ACL. This can be done either by adding the user to the ACL and specifying proper access type and permissions or by adding the user to a group that is already listed in the ACL and granted the desired. To edit the ACL of a database, using the Domino Admin client, carry out the steps described in the next two figures.

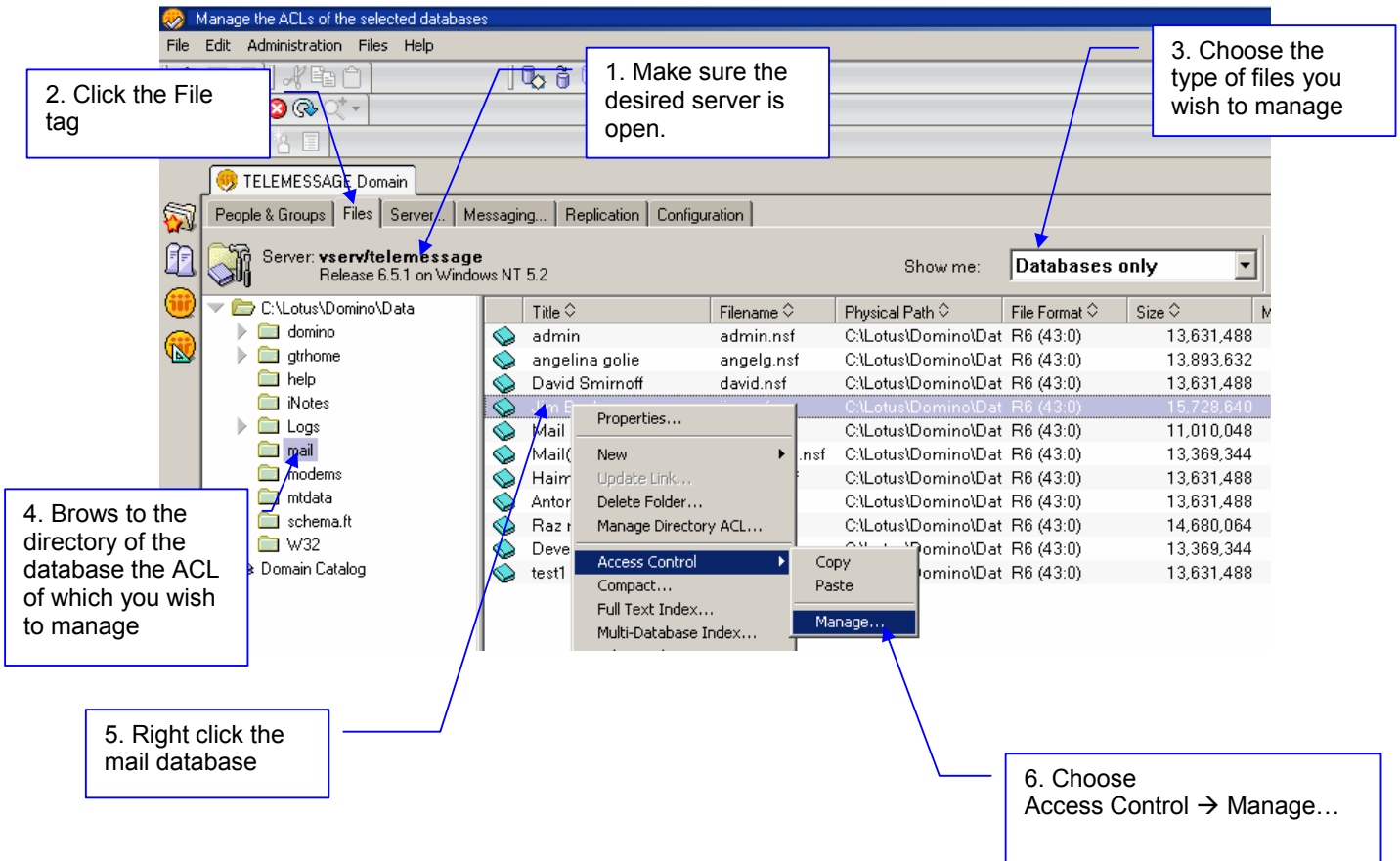


Figure 23 – Opening the database ACL

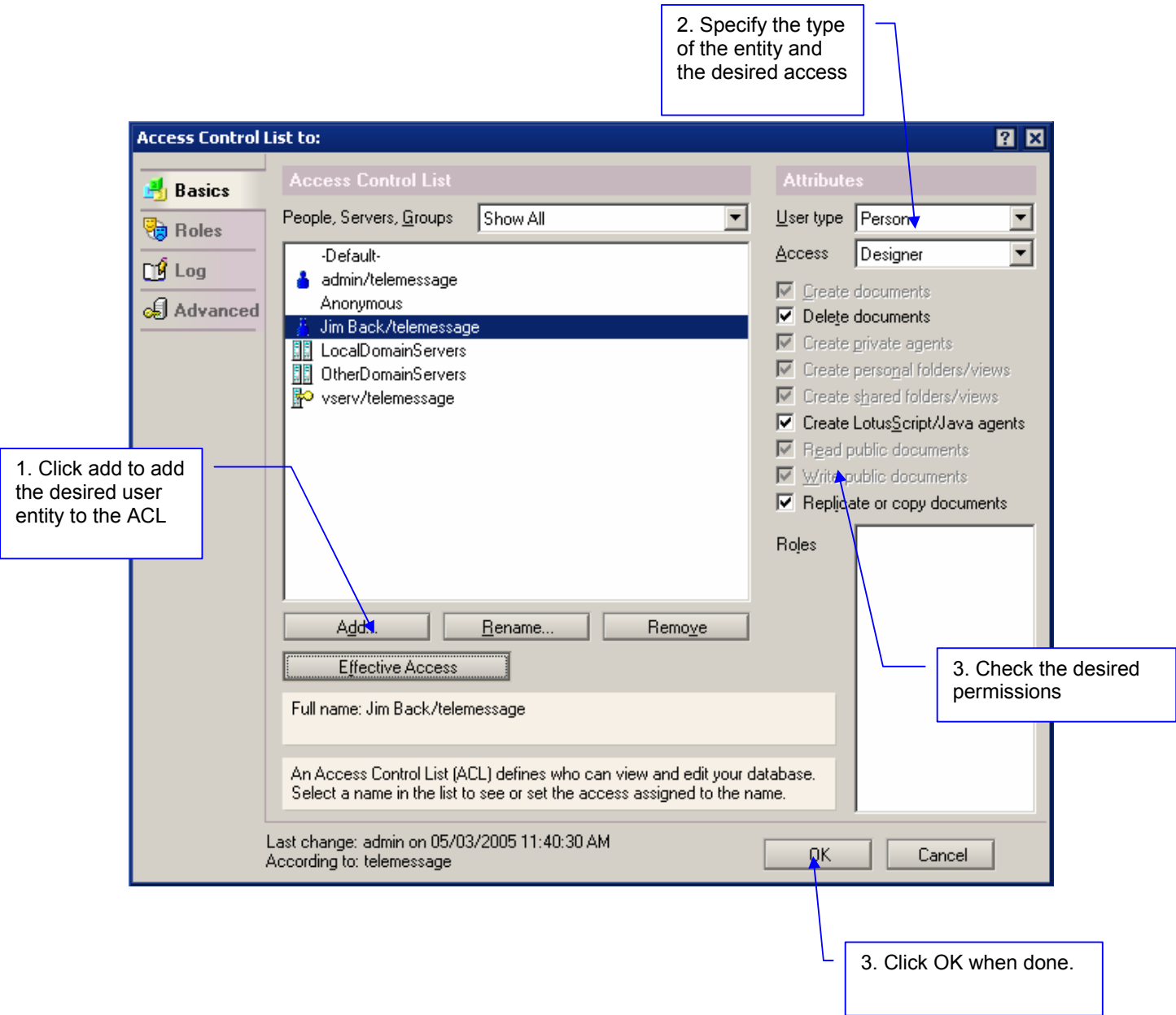


Figure 24 – Editing database ACL

5. Managing Administration ECL (Execution Control List)

- a. Using the Domino Administrator client, switch to an administrator ID,
- b. Open the Domino directory (names.nsf) on the desired server.
- c. Go to Actions → Edit Administration ECL.

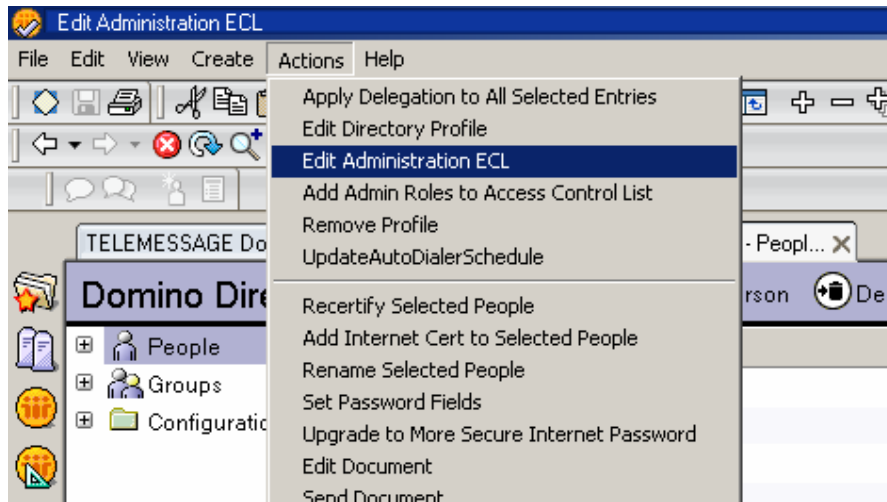


Figure 25 – Opening Administration ECL dialog

The “Workstation Security: Execution Control List” dialog that will appear (see figure below)

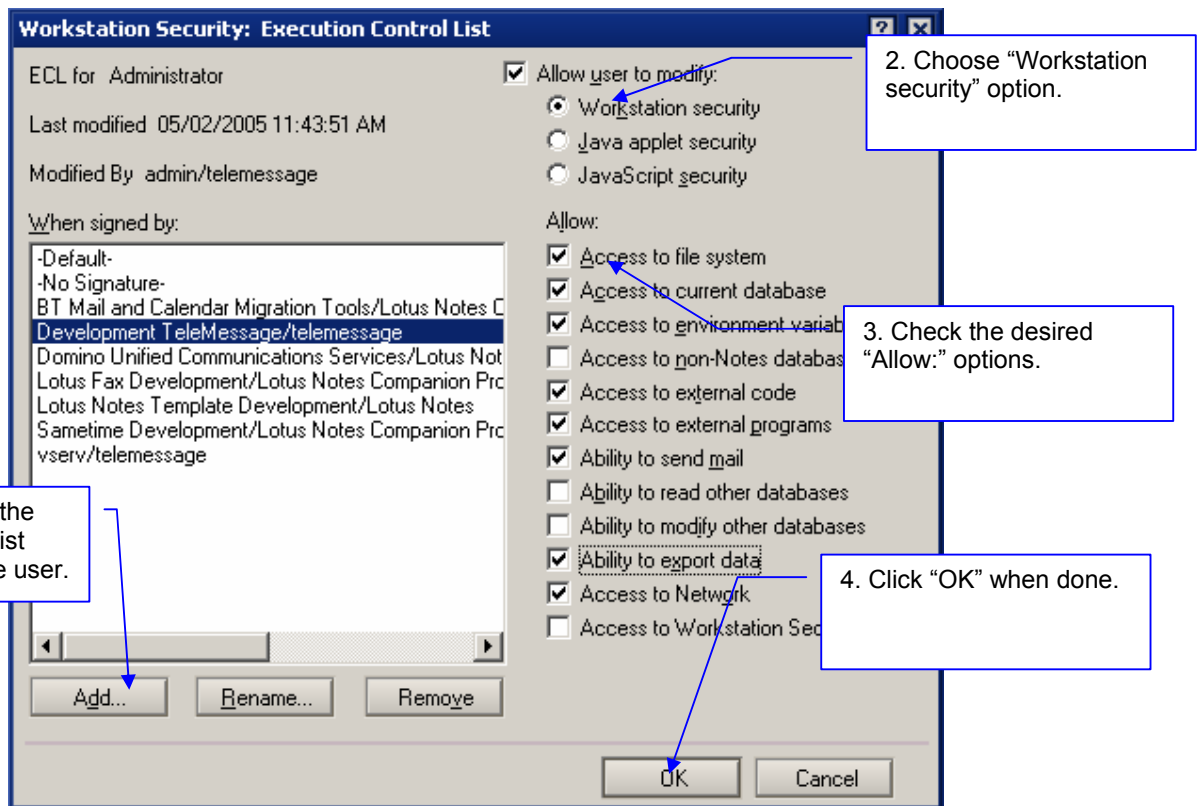


Figure 26 – Editing Administration ECL

- d. Click “Add” and add the desired user to the “When signed by:” list.
- e. Choose the desired user.
- f. Check all the desired “Allow:” options.
- g. Click “OK” when done.

6. Refreshing the client ECL

In order for the ECL change made on server (as described in section 5) to take effect on the Notes client, you have to refresh the ECL on the client.

To do this carry out the following steps:

1. Open the Notes client.
2. Open the user security dialog by choosing File → Security → User Security from the main menu (see figure below)

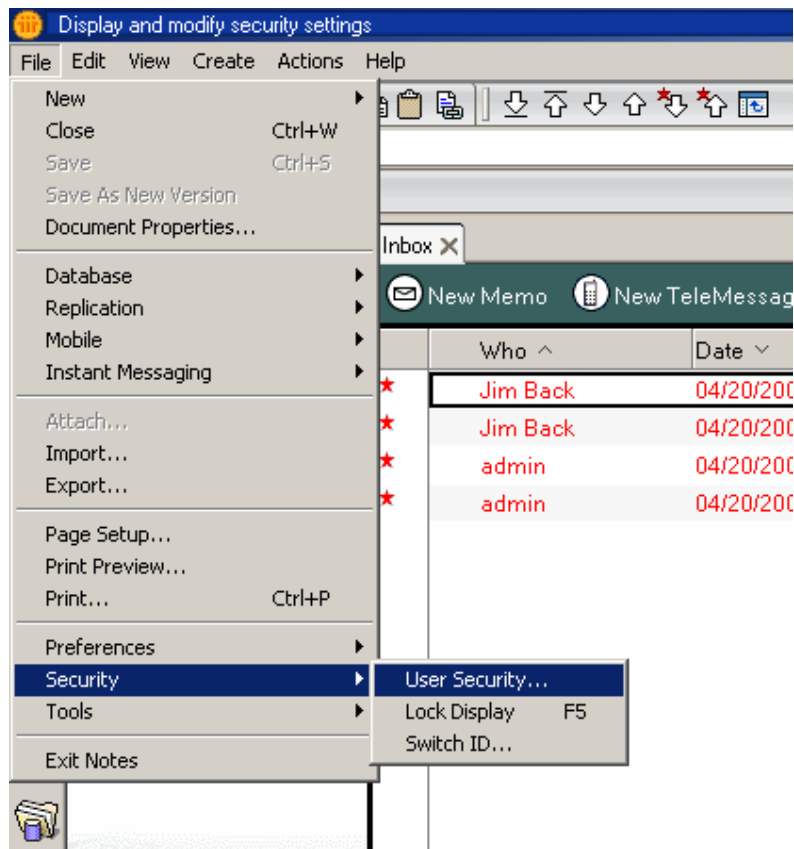


Figure 27 – Opening User Security dialog

3. Type the users password if your prompted to do so.

4. In the “User Security” dialog that will appear (see the figure below)

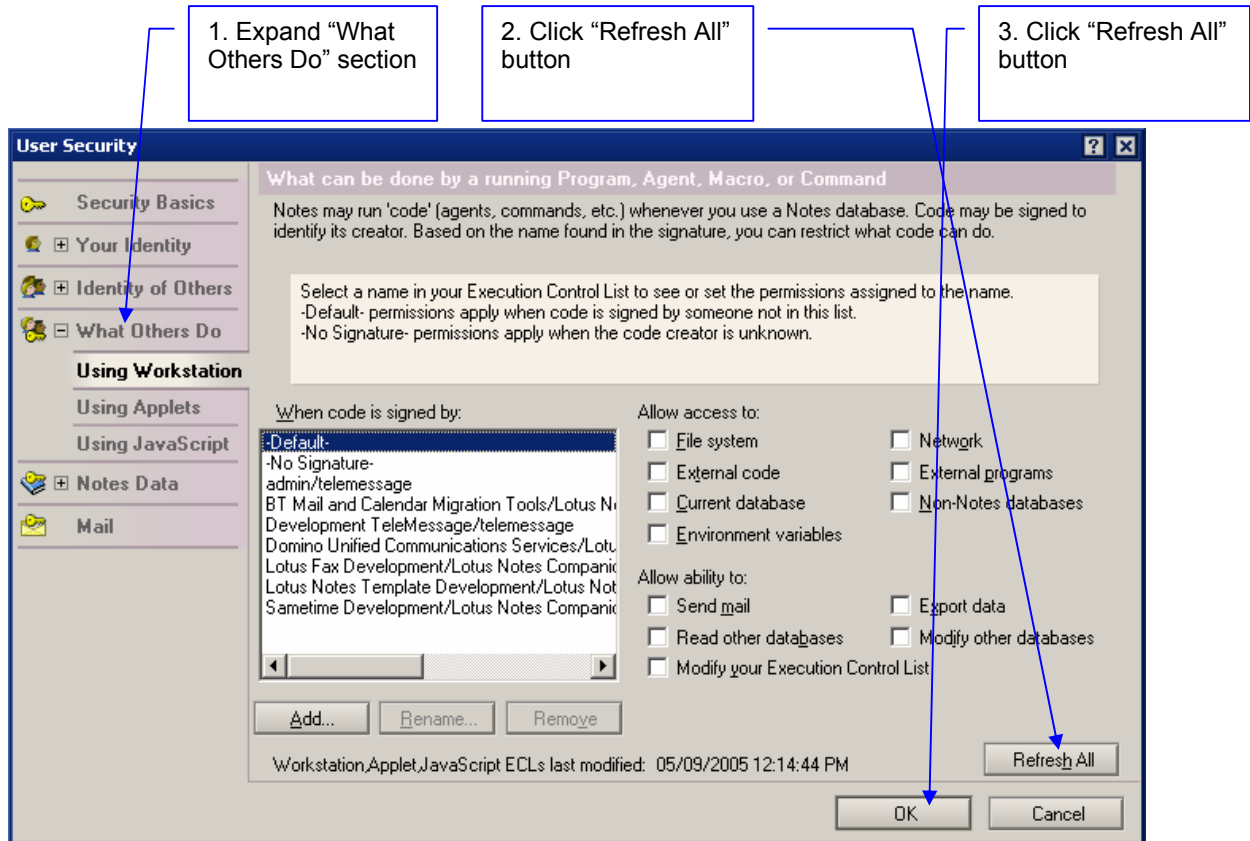


Figure 28 – User Security dialog

5. Expand the “What Others Do” section.
6. Click “Refresh All” button
7. Click “OK”

A dialog as in the next figure should appear.

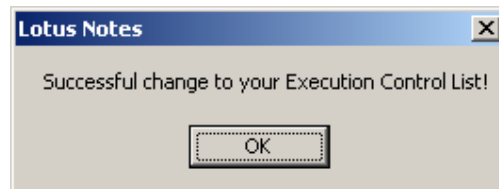


Figure 29 – ECL refresh confirmation

8. Click: “OK”